

FUNCTIONAL REQUIREMENTS MATRIX

Functional Category: Training

Vendor Response Codes:

S = Standard Function ("Out-of-the-Box")

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Reference Number	Business Requirements	Vendor Response	Comments	Cost to Modify	Hours to Modify	Upgrade Impact
	Training General Requirements					
TR 1.00	System should provide for the definition of a standard education and career development curriculum based on position, skill category, and other criteria. This capability allows supervisors to work with their subordinates to establish a career development plan specific to each particular employee.					
TR 2.00	System should provide for planning of future training (Full Fiscal Year):					
TR 2.01	Classes/sessions to be given					
TR 2.02	Number of employees to be trained					
TR 2.03	Projected cost of training (internal and external costs)					
TR 2.04	Opportunity cost of employees attending training					
TR 2.05	Source of funding					
TR 2.06	Track actuals against plan					
TR 3.00	System should provide for the definition of a career development plan, including standard and alternative career paths (position series).					
TR 4.00	The system shall support the functions of training, employee development, skills tracking, testing, licenses, and certifications. At a minimum, the following broad functions will be supported:					
TR 4.01	Creation, tracking and maintenance of lessons (the lowest grouping of items taught - same lesson can belong to more than one class)					
TR 4.02	Creation, tracking, and maintenance of classes (a group of one or more lessons - same class can belong to more than one course)					
TR 4.03	Creation, tracking and maintenance of courses (a group of one or more classes - same course can belong to more than one program)					
TR 4.04	Creation, tracking, and maintenance of programs / curriculums (a group of one or more courses)					
TR 4.05	Tracking of Outside Training - training provided by other agencies, vendors, and organizations					
TR 4.06	The tracking of skills, certifications, licenses and Continuing Professional Education (CPE), Continuing Education Units (CEU) and/or Continuing Legal Education (CLE) credits obtained by successful completion of a lesson, class, course, program, or outside training					

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TR 4.07	Tracking of employee training and enrollment in classes, courses, programs, and outside training, including Continuing Professional Education (CPE), Continuing Legal Education (CLE) and/or Continuing Legal Education (CLE) credits.					
TR 5.00	System shall support flexible approval routing/workflow for all system events.					
TR 6.00	This component shall be integrated with other components of the system, including:					
TR 6.01	Personnel Administration					
TR 6.02	Accounts Payable					
TR 6.03	Position Control					
TR 6.04	General Ledger					
TR 6.05	Budget Development					
TR 7.00	The system shall provide the capability to track and report direct costs for training including costs for training instructor(s) (whether staff time or contractor-provided), venue cost, travel expenses, materials, etc. by individual, course, chart of accounts, for user defined time periods.					
TR 8.00	The system shall provide the capability to track and report indirect costs for training including employee time by classification, hourly cost linked to a salary table, etc. by individual, course, chart of accounts, etc.					
TR 9.00	The system shall provide the capability to book conference rooms directly or through on-line links to facilities management programs.					
TR 10.00	The system shall provide the capability to track and report budget and statistical information such as fund, revenue source, no. of persons per workshop, date of workshop, priority rating, training date, justification statements, organization, program, etc.					
TR 11.00	The system shall provide on-line inquiry screens that displays training data including but not limited to budget and financial information.					
TR 12.00	The system shall provide on-line approval of training budget requests based on varying levels of security as defined by the agency.					
TR 13.00	The system shall provide on-line approval of training requests based on varying levels of security as defined by the agency.					

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TR 14.00	The system shall provide the capability to summarize varying levels of chart of account codes such as organization, expenditure, and fund levels, etc.					
TR 15.00	The system shall provide the capability to generate ad-hoc reports.					
TR 16.00	The system shall provide user defined security features including ability to control access and update capabilities based on any data element values (see fields within Data Requirements).					
TR 17.00	The system shall provide user defined security features including ability to control access and update capabilities based on screen.					
TR 18.00	The system shall produce notification conflicts of training schedules.					
	Training and Development					
TR 19.00	The system tracks classes and courses needed for career / job progression planning and for required prerequisites for employees.					
TR 20.00	The system shall allow for the recording of prerequisites for courses (other courses, entry exams, certifications, licenses, etc.).					
TR 21.00	The system shall monitor prerequisites by employee when enrollment in classes takes place and prohibit (with override capability) enrollment if prerequisites are not satisfied.					
TR 22.00	The system shall provide the ability to produce a course catalog and schedule of training sessions.					
TR 23.00	The system will provide the capability for employees to be able to view and search the course catalog and the schedule of training sessions.					
TR 24.00	The system will provide the capability of tracking which lessons, classes, courses, programs, and outside training are mandatory. In addition to general lesson, class, course, and training session information, each Mandatory Training entry must include:					
TR 24.01	Frequency					
TR 24.02	Reason for being mandated					
TR 24.03	Mandating Agency / Organization					
TR 25.00	The system shall provide the capability to allow mandatory training to be displayed and updated when any individual lesson, class, course, program, or outside training is created and/or updated.					
TR 26.00	System reports scheduled training sessions and anticipated attendance list.					

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TR 27.00	The system calculates the number of training sessions required to train various populations according to flexible criteria including those below. The results would be available for the training coordinators' use for flexible scheduling and enrollment.					
TR 28.00	The system will provide the capability for any lesson, class, course, or program to be scheduled as a training session. The training session inherits information as appropriate from the referenced lesson, class, course, or program. Regardless of if course has CEU credits or not.					
TR 29.00	The system creates a training session outline that lists all the lessons, classes, courses, and programs associated with the training session.					
TR 30.00	The system flexibly allows groups of employees to be associated with a staff development training coordinator for their functional development needs.					
TR 31.00	The system allows for designation of a logistical training coordinator to be associated with specific training sessions.					
TR 32.00	The system allows for designation of a subject matter training coordinator to be associated with a set of lessons / classes / courses / programs.					
TR 33.00	The system notifies all appropriate training coordinators of a planned training session.					
TR 34.00	The system will provide the training coordinator to be able to enroll employees in a specific training session.					
TR 35.00	The system creates a wait list when training session maximum enrollment is reached.					
TR 36.00	The system lists replacements for the training session roster based on the most deficient employee, or the position of the employee in the wait list queue.					
TR 37.00	The system creates the appropriate roster for the training session in a predefined modifiable format.					
TR 38.00	The system notifies enrollees via email / paper / TTY when enrolled in, or wait listed for, a training session.					
TR 38.01	The email may be sent from either the employee's regular training coordinator and/or the training session coordinator.					
TR 38.02	Of these two, one is the sender and the other receives a copy of the email					

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TR 38.03	The enrollees' email also contains a link to a web page for the enrollee to perform various activities such as:					
TR 38.04	Cancel attendance - generates an email via workflow to the employee's training coordinator, the training session coordinator, and the employee's supervisor					
TR 38.05	Ask a question about the training session - generates an email to the training session coordinator					
TR 38.06	Ask a question of their training coordinator - generates an email via workflow					
TR 39.00	The system records attendance of an attendee at a training session (lesson, class, course, program, or outside training) in hours.					
TR 40.00	The system tracks attendance of a lesson, class, course, or outside training based upon attendance of a training session inclusive of that lesson, class, or course.					
TR 41.00	The system tracks the grade achieved by an attendee for a lesson, class, course, or outside training based upon grade achieved at a training session inclusive of that lesson, class, course, or outside training.					
TR 42.00	The system updates training session roster based on actual attendance at the completion of the training.					
TR 43.00	The system will automatically update skills / certifications / licenses of attendees who have met the course completion (time) and grade requirements.					
TR 44.00	System should support identification of employees and contractors via 'swiping' of badges for appropriate situations such as recording attendance at a training session, signing into the rifle range for ammunition allowance, etc.					
TR 45.00	The system notifies the employee's training coordinator and supervisor if actual attendance hours don't match the planned attendance hours (if employee missed part of the training session). The level of missed class time allowable may be set by the user.					
TR 46.00	The system will generate at least the following notification letters (paper and/or email):					
TR 46.01	Wait list notification to employee with copy to manager					
TR 46.02	Closed class notification to employee with copy to manager					

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TR 46.03	Confirmation of class notification to employee with copy to manager					
TR 46.04	No-show and cancellation notifications to employee with copy to manager					
TR 47.00	The system will generate customizable notification forms by user definable criteria (division for example) at a predefined period of time prior to the start of the training session.					
TR 48.00	The system will generate labels for mass notification mailings.					
TR 49.00	The system will provide the capability to record and report planned and actual information based on user defined criteria, for each training session.					
TR 50.00	The system, for each training session, will notify instructors and enrollees (email / paper / TTY) of:					
TR 50.01	Location					
TR 50.02	Logistical requirements					
TR 50.03	Supplies needed					
TR 50.04	Pework					
TR 51.00	System should provide the ability for multiple levels to authorize training requests (Automate In-Service/Out-Service Nomination Form).					
TR 52.00	System should provide the ability for employees to request training using a standard Web based browser (Automate In-Service/Out-Service Nomination Form).					
TR 53.00	System should provide the ability for employees to request travel authorization linked to an approved or requested training request.					
TR 54.00	System should provide the ability for employees to request a travel advance linked to an approved training request and travel authorization.					
TR 55.00	System should track training for specific job classification (multiple text entries) for applicants.					
TR 56.00	System should track qualifications for specific job classification (multiple text entries), for applicants.					
TR 57.00	The system will track the following information on instructors:					
TR 57.01	Instruction certification by which lessons, classes, courses, or programs					

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TR 57.02	Which classes, courses and training sessions they instruct, even if the State does not offer that training. For example, instructing a class for the FBI.					
TR 58.00	The system should provide for easy and flexible interfacing with State institutions such as community colleges and State Universities for:					
TR 58.01	Attendance (including credit hours certifications, grades, etc.)					
TR 58.02	Billing					
TR 59.00	The system should support non-agency and non-State attendees with functionality including:					
TR 59.01	Enrollment					
TR 59.02	Attendance tracking (by person)					
TR 59.03	Identification of the outside attendee's training coordinator (name and contact information)					
TR 59.04	Billing (flexible rules according to class, course, offering agency, attending agency/organization, etc.)					
TR 59.05	Limitation of number of training session slots available to outside agencies / organizations					
TR 59.06	Prioritization of training session slots by outside agency / organization					
TR 59.07	Automatic increase of (or reminder to training session coordinator to increase) number slots available for outside agencies / organizations at a predetermined time period prior to the start of the training session.					
	Training and Tuition Reimbursement					
TR 60.00	The system should support the Tuition Reimbursement program including:					
TR 60.01	Courses enrolled in / completed					
TR 60.02	Units enrolled in / completed					
TR 60.03	Total cost of educational program					
TR 60.04	Summary and detailed reports					
TR 61.00	System should allow the employee to be able to request tuition reimbursement via Employee Self Service and track the status of the request and payment.					
TR 62.00	The system should support the Training Reimbursement program including:					

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TR 62.01	Courses enrolled in / completed					
TR 62.02	Units enrolled in / completed					
TR 62.03	Total cost of educational program					
TR 62.04	Summary and detailed reports					
TR 63.00	The system shall track situations where employee is required to maintain employment for a certain period of time after the completion of training and notify designated personnel when employee terminates prior to the time period.					
	Query Requirements					
TR 64.00	System allows employees to query the database to find all classes, courses, programs, and outside training:					
TR 64.01	They have completed, with test scores and dates					
TR 64.02	In which they have enrolled					
TR 64.03	That teach / impart a specific skill or certification					
TR 64.04	Needed for career / job / level of certification progression (classes and courses to address a skills / certification gap)					
TR 65.00	System allows flexible queries that allows the analysis of lesson, class, course, program and outside training information including:					
TR 65.01	Offerings (training sessions)					
TR 65.02	Attendance					
TR 65.03	Costs					
TR 65.04	Over periods of time					
TR 66.00	System allows flexible queries that allows the analysis of training, license, and certification gaps.					
	Reporting Requirements					
TR 67.00	System produces detailed and summary ad-hoc and regularly scheduled reports utilizing user defined criteria.					